



WELCOME TO EVERGREEN INDIANA

Welcome to Evergreen Indiana, a growing resource-sharing Indiana public library consortium ("EI Consortium"). The EI Consortium currently has more than 99 members, including the Indiana State Library. A complete list of the member libraries is online at: <http://www.in.gov/library/3399.htm>.

This document provides information on the EI Consortium and the migration process. You are encouraged to visit the Evergreen Indiana website for additional information and resources: <http://www.in.gov/library/evergreen.htm>.

ABOUT THE CONSORTIUM

Governance The EI Consortium is governed by an elected nine-member EI Executive Committee. The members of the Executive Committee and their respective terms as well as the meeting dates and minutes are available on the Evergreen Indiana website at: <http://www.in.gov/library/3397.htm>.

Member Communication Member libraries are kept informed through the following means of communication:

- ❖ **Weekly Update Blog.** <http://blog.evergreen.lib.in.us/> Member libraries receive a weekly update via email distribution. A library chooses which staff member(s) are to receive the distribution. All members can access the blog and those who receive the Weekly Update emails are encouraged to pass along the information to their colleagues and staff members. Please send an email to: Shauna Borger at sborger@library.in.gov with a request to add staff to the weekly distribution. Please include name(s) and email address(es).
- ❖ **Catalog ListServ.** <http://www.in.gov/library/3379.htm> Member libraries use this listserv to post and answer catalog questions. In addition, the EI Catalog Committee posts policies and changes to the catalog training manual and catalog procedures guide. Each member library is required to have at least one member on the catalog list serve. Please send an email to: Lisa Meadows at lmeadows@library.in.gov with a request to add staff to the list serv. Please include name(s) and email address(es).
- ❖ **EG Support ListServ.** <http://www.in.gov/library/3379.htm> Member libraries use this listserv to post and answer questions about using the software and transiting materials among other things. Each member library is required to have at least one member on the EG Support Listserv. Please send an email to: Lisa Meadows at lmeadows@library.in.gov with a request to add staff to the list serv. Please include name(s) and email address(es).
- ❖ **EG Reports ListServ.** <http://www.in.gov/library/3379.htm> Member libraries use this listserv to post and answer questions about using the reports and admin module of the

Evergreen software. This is a voluntary list serv. Please send an email to: Lisa Meadows at lmeadows@library.in.gov with a request to add staff to the list serv. Please include name(s) and email address(es).

- ❖ **Circulation Support Contact List and ListServ.** Each member library is asked to designate a staff person to respond to emails and phone calls from other member libraries with respect to transited items and merging patrons. This individual should have the authority to make circulation decisions. For example, a member library may call on behalf of a patron requesting the price of an item and processing fees for an item that the patron is reporting lost. The designated individual will also be subscribed to the circulation support listserv. Please provide the name, title, email and phone contact information for your library's designated circulation support contact to Shauna Borger at sborger@library.in.gov.

Tech Support The Indiana State Library provides tech support to the libraries. Help desk tickets may be submitted via the Evergreen Indiana splash page or [through any internet browser](#). Libraries should expect to receive an automated response followed up by an email response within 24 hours. In addition, there is a 24/7 tech support toll free number: 1.877.262.0025. The Twitter account to follow tech support announcements is: <https://twitter.com/eisupport>.

Non-automated Libraries To date, eight non-automated libraries have joined Evergreen Indiana. These libraries are provided with assistance and training to bring their catalog and patron records online. Non-automated libraries will be required to purchase scanners and receipt printers. Additional information is available by contacting Shauna Borger at sborger@library.in.gov.

Policies and Procedures Membership in the EI Consortium is governed by policies adopted by the Executive Committee. To date the Executive Committee, with advice and recommendations from a variety of sub-committees, has adopted catalog, circulation, staff card, patron confidentiality and software policies. These policies are available on the Evergreen website at: <http://www.in.gov/library/3382.htm>. Member libraries are responsible for reviewing these policies with their staff and implementing the policies at the local level.

Library Cards and Barcode Labels Member libraries use a universal Evergreen library card purchased from Creative Data Products. The reverse side of the card displays the patron barcode and information unique to each library (name, address, website and telephone number). The library cards are ordered approximately once a quarter and may or may not arrive prior to the library's migration. Library cards issued prior to migration will migrate and are valid and usable subsequent to migration provided they utilize a 14-digit bar code.

The Indiana State Library purchases the first order of library cards necessary to replace currently issued outstanding library cards (*e.g.*, if a library currently has 9,000 cards issued and active, the State Library will purchase 9,000 library cards). In determining the starting number of the first Evergreen Indiana library card, libraries are cautioned to make sure they do not overlap their existing available bar code ranges (*e.g.*, Best Library has issued cards 28765 00000 0001 to 28765 00001 0850 and has up to card number 28765 00001 5001 in the box to be issued. Best Library would then start its Evergreen cards at 28765 00001 5002).

Libraries are welcome to join in future orders at their own expense when they need to replenish library card and item barcode supplies. Typically, the price per card/barcode is lower when the library participates in the consortium buy. The consortium buys are announced via the [Weekly Update blog](#).

Informational Resources

- ❖ **Patron resources.** A variety of PR resources and guides are available on the EI website. These materials are simply starting points and member libraries may modify these to best serve their patrons. See: <http://www.in.gov/library/3379.htm>.
- ❖ **Staff resources.** Staff training documents and tutorials are available online at: <http://www.in.gov/library/3380.htm>.
- ❖ **Additional InfoExpress Days.** Most libraries find they need an extra day of InfoExpress delivery/pickup to transit materials for their patrons. To assist Evergreen libraries in serving their patrons, the State Library is subsidizing an additional delivery/pickup day at the same \$75 subsidized rate that is currently in effect for a library's first day of pick-up.

Contact David Michael Hicks dmhicks@library.in.gov to add an additional day. Be sure to state you are an Evergreen library when requesting the additional day to get the reduced subsidized rate. When adding the additional day you may also change your existing day if the InfoExpress system is able to accommodate the request (*e.g.*, a library that currently has Tuesday, may request to change to Monday and Friday.)

- ❖ **Consortium Purchases of library cards and barcodes.** The EI Consortium, via the Indiana State Library, has the ability to place consortium orders of library cards and barcodes to assist libraries in purchasing supplies at a lower price. Upcoming purchases are announced in [Weekly Update blog](#).
- ❖ **Committee membership.** The EI Consortium has a number of committee opportunities: catalog, circulation, serials and acquisitions, technology and OPAC. Libraries are encouraged to provide staff to serve on the committees.

MIGRATION PROCESS

Membership Documents To begin the migration process, you must turn in the Membership Agreement, Code of Ethics, Board Resolution to Accept Payments on Behalf of Other Evergreen Libraries and the Board Resolution to Establish the Evergreen Indiana Fund. The [Evergreen Indiana Membership Packet](#) is available on the [Information and Resources for Interested Libraries website](#). The Evergreen Indiana Coordinator will present your documents to the Executive Committee who will vote to formally accept your library into the consortium. After that, the first step in the migration process will be to determine whether or not your library needs to rebarcode.

Rebarcoding Items Evergreen uses a standard 14-digit bar code scheme. A library which uses 14-digit barcodes (either sequential or check-digit) that does not conflict with a prefix used by an existing Evergreen member library does not need to rebarcode.

Those libraries utilizing anything other than a 14-digit barcode are provided with assistance in rebarcoding. The process uses printers that scan an existing barcode and print out the new barcode label. The Indiana State Library provides the printers and the new high quality barcode labels. The new labels include the library name and the barcode.

Request for Information and OPAC Configuration The migrating library will be asked to fill out the [Request for Information and OPAC Configuration survey](#). This document will help ISL staff determine whether or not the library needs to rebarcode their items and how long it will take if they do. A migration date will be assigned when the Evergreen Indiana Membership Packet is received.

Planning the Migration Migration at its simplest involves the transfer of patron, transactional (fines/fees, holds, items out) and bibliographic records from an existing ILS (legacy system) to the corresponding Evergreen Indiana databases. At this time, the Indiana State Library is paying for the transfer of bibliographic and patron records and the clean-up of patron address records, in addition to other non-migration items.

Transactional data is the most complex to migrate, varying in structure and storage for each type of legacy system. Each library's transactional data is evaluated at the time of the first data extraction to determine its viability and to estimate the expense involved in migration of the transactional data. Upon receipt of the estimate, the State Library and the migrating library will determine whether it is cost-effective to migrate the transactional data.

The actual hands-on migration process is about 8-10 weeks. In the meantime there are a number of tasks the library may want to undertake to create a better migration environment. These include the following:

- ❖ ***Closely examine the terms of the library's current ILS contract.*** Review, understand and comply with all notice/termination provisions. Discuss extraction procedures with the legacy vendor if you require assistance in the extraction and delivery of data (*see below*, data extraction instructions). In some instances, the library may need to pay to extract the data from the legacy system, particularly if the library doesn't house its data onsite. Some libraries have elected not to pay the fees and walked away from vendors, electing instead to recatalog, but this is a library board decision.

Also familiarize yourself with all post-termination contractual obligations. The library may need to destroy or return print manuals, delete software off of workstations and other tasks. Library administration will want to have a clear understanding of when the legacy system ceases operating so that all statistical reports necessary to complete the library's annual library report to the Indiana State Library are prepared and retained. ***It is vital that each library run necessary circulation reports and computer use (where appropriate) in the legacy system so that an accurate count can be reported in the Annual Report.***

- ❖ ***Survey the library's data and weed out the bad information.*** Library staff is probably familiar with at least some of the bad data: the short records that never got updated, the patrons who never got marked inactive or deleted and the bibliographic records that were never deleted when items were discarded. This bad data will transfer at migration and may cause staff and patron confusion post-migration. It is simply easier and less costly to remove it prior to migration.
- ❖ ***Weed the collection.*** Now is the time to weed those ten year old medical/health books in the 600s as well as make sure the bibliographic records reflect actual inventory.

- ❖ ***Make sure library hardware and software meet minimum technical requirements.***

Recommended Hardware

Windows XP or later
2GB RAM or greater
Dual Core CPU or greater
Broadband internet connection

Minimum Hardware

Windows XP or later
1GB RAM (at least 300MB RAM must be available to staff client under normal system load)
Pentium 4 or newer processor
200MB of hard drive space

- ❖ ***Buy equipment such as a barcode scanner and receipt printer.*** If you don't have both of these pieces of hardware at each workstation, please look into purchasing more. Contact your regional coordinator or Evergreen Indiana Coordinator for more information.

Data Extraction In addition to the preparation of the mapping documentation, libraries will be required to extract and forward data to an assigned FTP, SCP or other site. Instructions for the data extraction delivery dates and sites will be distributed to each individual library. In the interim, the library should prepare to meet the following data delivery requirements:

- ❖ ***Data Format Requirements.*** The required data is a full MARC Record export, full patron listing in Tab or Comma delimited format, and Reports in Tab or Comma delimited format showing checkouts, fines/fees, notes, holds, etc. Each export should include sufficient linkage of data using item and patron barcodes. For example, a "holds" export should include at a minimum patron name, patron barcode, item barcode, item type, item title and date of hold. It is not sufficient to simply have patron name and title. Similarly, an "items out" report should include patron name, patron barcode, item barcode, item title, date out and date due.
- ❖ ***Data Extractions.*** Depending upon the type of migration, data extractions occur at three or four points. The first full data export is usually about 8-10 weeks prior to the migration date. This is often referred to as the "test extraction" as this is the data that the programmer uses develop the migration coding/script against.
- ❖ ***Final Extraction.*** A few days prior to migration, a final extraction of patron, bibliographic records, items, holds, fines and fees, and items out (circulations) will be done. Once this extraction is done, the library will need to close or move to offline (*see below*, Planning the Migration). A "catalog freeze" and a "patron record freeze" is in effect.
- ❖ ***Decide who will extract your data.*** Contact your vendor and/or confirm the library IT staff is able to extract and deliver on the assigned dates. Failure to deliver data extractions may delay the migration. If the library is outsourcing the data extraction, confirm delivery dates, delivery methods and costs associated with any data extractions.
- ❖ ***Tech Support.*** The Indiana State Library MIS team will provide instructions as to where the data should be delivered and may be able to provide limited support in how to do the extractions.

Mapping the Migration The first task assigned a migrating library is the preparation of mapping documentation. The mapping is done in a four-page Excel workbook. The workbook and instructions are distributed to each library about 8-10 weeks prior to migration. Each library is also asked to complete an OPAC configuration form http://www.in.gov/library/files/opac_config.pdf that provides basic operating information such as hours and addresses. This information is used to set up the library's organizational unit in Evergreen.

The mapping explains how data stored in the legacy system will correlate to the corresponding Evergreen databases. For example, if the legacy system identifies reciprocal borrower patrons as "RB" the library will indicate that a patron record with an "RB" designation should transfer to the "Reciprocal Borrower" user group in Evergreen. Similarly items will be mapped. For example, if the legacy system uses "bk" for books the library will indicate that these items should transfer to the "book" circ modifier.

Appendix A hereto includes is a list of the Evergreen "users" and a circulation matrix (last page) that lists all the permitted "circulation modifiers." Please note that the "users" and "circulation modifiers" listed in Appendix A are the only users and circ modifiers available to the library. All your existing data must map to one of these patron and item designations.

As part of mapping, the library will also designate lending periods. Each Evergreen circulation modifier has three lending periods. See the circulation matrix in Appendix A. To avoid patron confusion, the use of the "default" lending period is highly encouraged absent some special need by the library.

Last, the mapping will define the library's shelving locations. Shelving locations display in the OPAC and should assist the patron in locating the item. Shelving locations are unique to each library and may be changed at migration. The only caveat is that the programmer must be able to find the existing shelving location in the record to transfer it to the same or a new shelving location identity. For example, a library may believe that "ADULT FICTION" is a current shelving location because that is how it displays in the OPAC. However, the bibliographic record reads "ADULT FIC." The mapping must reflect what is in the MARC record. This might be the time to condense, modify (get rid of "basement") or create new shelving locations.

The mapping information provided herein is to encourage library staff to begin reviewing and understanding how the library's data is "truly" stored in the legacy system. Along with the upcoming distribution of the mapping workbook and OPAC config form (and related instructions), conference calls will be scheduled with any library needing additional assistance to work through the process. Most libraries find they complete the documentation in a day or two at the most.

Testing the Data

1. Visit the [Staff Training Documents website](#) to download and access the migration server.
2. The Evergreen Indiana Coordinator will notify you of the migration server username, password and your library shortname(s). You will need these to register the workstation.
3. Open the Item Status screen (F5 or Circulation -> Show Item Status by Barcode). Once that tab is open, press Control and T to open a new tab. In the new tab open the Catalog screen (F3 or Cataloging -> Search the Catalog).

4. Collect items from each of your shelving locations (ex. Children's Non-Fiction, Biographies) and check them in both the Item Status screen (F5) and the Catalog screen (F3). The objective here is to search through the item details and double-check to make sure nothing seems strange or missing. **Do this at all branches!**
5. After looking at the item information, open the Patron Checkout Screen (F1 or Search for Patron by Barcode) or open the Search for Patrons screen (F4 or Search -> Search for Patrons) if you only recall a patron name and not a barcode.
 - a. Here you are looking through the patron information to see whether any of the information looks strange or is obviously missing. **Do this at all branches!**
6. If you see missing information anywhere, please fill out a helpdesk ticket <http://help.evergreen.lib.in.us/helpspot/index.php> complete with a description of what you are doing (Example: Cannelton Public Library is reviewing our data in preparation for migration in August) and any item or patron barcode numbers in which you discovered the strange/missing data. The more information you include in helpdesk tickets, the better!

Circulation, Catalog and Admin/Reports Training

- ❖ *Circulation Training.* Circulation training is a four-hour class and should be taken close to the library's migration date. The class is held in the computer training lab at the Indiana State Library each month. Training is conducted by Indiana State Library staff and four technology LEUs are awarded for attendance at the circulation training
- ❖ *Catalog Training.* Introduction to Cataloging training is held in the computer training lab at the Indiana State Library every month. The introduction course is a three hour course and the advanced course (offered approximately once per quarter) is also six hours. Each library is required to have at least one person on staff that has attended both the introductory and the advanced class. Training is conducted by Indiana State Library staff and the Evergreen Indiana catalog committee. Three technology LEUs are awarded for attendance at the introduction course and six technology LEUs are awarded for attending the advanced course.

The catalog training courses are held periodically to coincide with migrations. Each library is required to have at least one Cat1 cataloger on staff. Cat1 status is awarded at the completion of both the introduction and advanced catalog courses.

- ❖ *Reports/Admin Training.* Reports/admin training is a two-hour course held in the computer training lab at the Indiana State Library every month. Two technology LEUs are awarded for attendance at the reports/admin training.
- ❖ *Advanced Cataloging.* Advanced cataloging is an all-day course held at various locations around the state of Indiana. This course will teach Evergreen Indiana catalogers how to do original cataloging and advanced techniques such as merging records. After completion of the course, participants will be given instructions for signing up for a Cat1 log-in which will allow them to accomplish the tasks that they learn in the Advanced cataloging training. According to Evergreen Indiana Cataloging Policy, each Evergreen Indiana library is required to have a trained Cat1 on their staff.

- ❖ **Tutorials and other training materials.** Brief tutorials and copies of the materials distributed at the reports/admin training are online at: <http://www.in.gov/library/3380.htm>. The catalog procedures guide is online at: <http://www.in.gov/library/3386.htm> and the catalog training manual is online at: <http://www.in.gov/library/3380.htm>. Libraries are encouraged to download the demo on a computer and permit staff to play around with the modules after training and before migration. It is impossible to injure the demo. Instructions for accessing and downloading the demo are at: <http://www.in.gov/library/3380.htm>.

Class name	Length of time	LEUs	Staffing requirements	Timeframe	Perquisites
Circulation	4 hours	4 Technology	At least 2 staff members attend the training. All staff need this training before Migration day.	No more than 60 days before migration	None
Basic Cataloging	3 hours	3 Technology	1 or 2 staff members must attend	No more than 30 days before migration	Circulation
Admin and Reports	2 hours	2 Technology	No more than 2 staff can attend	No more than 60 days before migration	Circulation
Advanced Cataloging	6 hours	6 Technology	At least 1 staff member must attend	Within 60 days of migration	Basic Cataloging
Cataloging Roundtables	2 hours	2 General	1 or 2 members of Cataloging Committee	Elective. No time requirement	Basic cataloging, Advanced cataloging

Offline or Close Libraries need to plan how to conduct operations for the three or four days between the final data extractions and the “Go Live” date (the “interim period”). Most libraries to date have utilized a combination of closed days and use of the offline mode in Evergreen. Some libraries have erased all but the most significant fees.

The offline mode (which will be covered in circulation training) allows libraries to continue to circulate items. Items may NOT be checked in using the offline mode. Once the migration is complete, the offline check-outs are uploaded to the Evergreen database and the library may start checking in items that have been returned subsequent to the final data extraction.

There is no one right way and the best option will likely be determined by patron needs. In addition, the ability to migrate transactional data will also impact on a library’s plan. Here are a few options to consider:

- ❖ **Assumes transactional data does migrate:** use offline to checkout for the entire interim period. All returned items are stored for check-in on the morning of “Go Live” once the all clear is given. Upload “offline” transactions on morning of “Go Live” once the all clear is given.

- ❖ **Assumes transactional data does migrate:** use offline for a day or two; close for a day for training and re-open at noon on the go-live date. This allows staff to practice in the live system before the public arrives.
- ❖ **Assumes transactional data does not migrate:** use legacy system and do business as usual. On the “Go Live” date start to use Evergreen for check-out. Continue to run the legacy system for check-ins until some period after the “Go Live” date (2-3 weeks depending on circulation periods). At the end of the period, transfer remaining check-outs to Evergreen and manually enter and outstanding fines/fees and any holds that the library wants to transfer

ADDITIONAL CONSORTIUM POLICIES

Basic Fine and Fee Structure

\$0.25 per day per item for overdue items for all items with a one day grace period with the exception of the “Staff” card profile. Items returned after the grace period will include a \$0.25 fine for the grace period day (i.e., an item returned 3 days after its due date will have a \$0.75 fine).

A \$10.00 cap per item for fee accruals. Patron is “blocked” once fees and fines reach \$10.00.

A patron will be “blocked” by the system when a patron has the following number of items overdue:

15 –	Resident	Resident-Limited Access
	Reciprocal Borrower	Reciprocal Borrower – Limited Access
	NonResident	NonResident – Limited Access
	Student	Student – Limited Access
	ILL	
	PLAC	PLAC – Limited Access
	Temp	
	Staff Card	
50 –	Outreach	

The number of overdue items is calculated on a Consortium level and not at a library level.

Overdue Notices

Users with valid email addresses will receive a three day pre-due date email notice and a date due email notice. Users will receive an email and print notice (send via US Mail) 14 and 28 days after the due date. A “LOST” notice will be sent via US Mail 45 days after the due date and include the replacement cost and a \$10.00 processing fee for each item. The 45 day notice will reference that additional charges may be added for library collection services.

Replacement Card Fee: \$2.00; must show proper identification to obtain a new card.

Limits on Number of Holds in the System

Patrons may place up to 20 unfilled holds in the system. The number of holds items is calculated at the consortium level. The system will age out holds older than nine (9) months old.

Number of Items Checked Out

Patrons may check out 100 items. Within the 100 item limit, there is a dvd limit of 10 items; video limit of 10 items, gaming software of 1 item, and art limit of 6 items. The number of items checked out is calculated at the consortium level.

Claims Returned

If a user claims to have returned materials that Evergreen Indiana still shows as checked out, the material may be marked with a "Claims Returned" date. Overdue fines stop accruing as of the date entered in the "Claims Returned" field. A user may have up to three (3) Claims Returned items on his or her record at any time. The number of Claims Returned items is calculated at the consortium level.

Holds Matrix

Five basic uniform hold rules:

- No Holds by any user group on three circ modifiers: Reference, ILL and Best Seller No-Hold
- All user groups, other than Computer Usage, may place holds on circ modifiers not listed in Rule 1 and there is no age protection between a library and its own branches
- User groups of other Evergreen Libraries may place holds on the following circ modifiers subject to a six month age protection on the following: audiobook, bestseller, book, book new, kit, magazine and music. (This means that the materials of the owning library are holdable only by the users of the owning library and its branches for the first six months of ownership.)
- Other Evergreen Libraries may NEVER place holds on the following circ modifiers (this means no hold may be placed by a non-owning library user group):

art	cd-music
dvd & dvd new	dvd r-rated & dvd new r-rated
equipment	media
realia	software
software gaming	software gaming new
special collections	talking book
video & video new	video r-rated & video new r-rated

- Maximum number of unfilled holds per user in the system is twenty (20). The system will age out holds older than nine (9) months old.

Other limits on when holds can be placed:

Available – holdable	Long Overdue – unholdable
Bindery – unholdable	Lost – unholdable
Cataloging – unholdable	Mending - holdable
Checked-out – holdable	Missing – unholdable
Claimed Return - holdable	On Holds Shelf – holdable
Damaged – holdable	On Order – holdable
Discard/Weed – unholdable	Reference – unholdable
ILL – unholdable	Reorder - holdable
In Process – holdable	Reserves – unholdable
In Transit -- holdable	Reshelving – holdable
	Temporarily Unavailable – unholdable

Checklist for migrating libraries

- ☐ Send signed [Evergreen Indiana Membership Packet](#) to Evergreen Indiana Coordinator in the Library Development Office at the Indiana State Library.
- ☐ Receive and read through the [Welcome to Evergreen document](#).
 - NOTE: All of the following steps are discussed in the [Welcome to Evergreen Indiana document](#).
- ☐ Make sure library hardware and software meets technical requirements.
- ☐ Purchase a receipt printer and barcode scanner for every workstation.
- ☐ Complete the [Request for Information and OPAC Configuration survey](#) and send in photocopies or real samples (preferred) of your item barcodes.
- ☐ If your items do not have 14-digits, Evergreen Indiana Coordinator will provide you with rebarcoding printers, training and support on how to rebarcode your collection.
- ☐ Work with Evergreen Indiana Coordinator to assign a migration date.
- ☐ Sign staff up for circulation and basic cataloging classes.
- ☐ Helpdesk staff will get in contact with the library to schedule the first data extraction.
- ☐ Helpdesk staff will provide library with a metadata mapping of current bibliographic and patron data and how it transfers to Evergreen.
- ☐ Library edits the mapping and turns it in to the helpdesk.
 - Please contact the Evergreen Indiana Coordinator with questions and comments.
- ☐ Helpdesk incorporates changes indicated in the mapping to the test data.
- ☐ Evergreen Indiana Coordinator contacts the library and asks that they test the item and patron data.
- ☐ Regional Coordinator gets in touch with the library and works with the library to plan out Migration Day.
 - It is best for the library to open in the afternoon on Migration Day. This way, the morning can be devoted to testing data and giving staff a refresher circulation course.
- ☐ Library decides how it will circulate materials between the last data pull and migration day.
 - Migration Day is usually a Tuesday so libraries need to circulate their materials with the chosen method from Friday morning until Monday evening.
- ☐ Library must run relevant reports in the old ILS before Migration Day to be used on the Annual Report.